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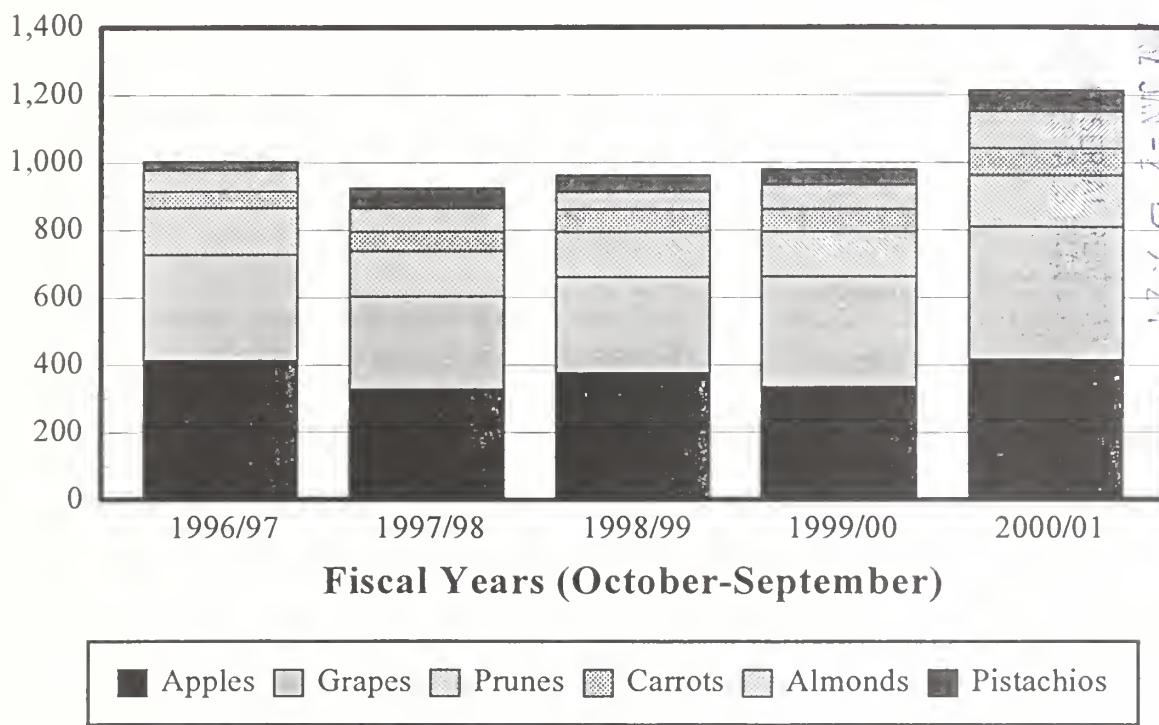
Foreign  
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# World Horticultural Trade and U.S. Export Opportunities

## Strong Export Growth for Key Products Helps Horticultural Exports to a Record \$11.1 Billion in FY 2001

Million\$



Source: U.S. Department of Commerce, Bureau of the Census

U.S. exports of horticultural products reached a record \$11.1 billion in fiscal year (FY) 2001 (October 2000-September 2001), up 5 percent from shipments in FY 2000. Shipments of tree nuts registered the most growth (up 14.5 percent to \$1.1 billion) for the October-September 2000/01 period. Exports of essential oils were up 14.4 percent to \$677 million, fresh fruit exports were up 9 percent to \$2.2 billion, and fresh vegetable exports were up 4 percent to \$1.3 billion. Some of the fastest growing products in FY 2001 were apples (up 24.4 percent), grapes (up 20.2 percent), prunes (up 14.2 percent), carrots (up 20.7 percent), almonds (up 48.8 percent), and pistachios (up 39.2 percent). The fastest growing markets for FY 2001 were: China, up 72 percent; Malaysia, up 58 percent; Mexico, up 12 percent; the Philippines, up 10 percent; Taiwan, up 10 percent, and the European Union, up 9 percent. On the other hand, exports to Japan were down 5 percent for the October-September 2000/01 period.

[Check Out the New U.S. Trade Internet System Website. Go to  
<http://www.fas.usda.gov/ustrade>]

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## Table of Contents

	PAGE
Export Summary .....	4
<b>FEATURE ARTICLES:</b>	
Processed Sweet Corn Situation and Outlook .....	6
Raisin Situation and Outlook .....	13
Walnut Situation and Outlook .....	19
Hazelnut Situation and Outlook .....	25
Strawberry Situation in Selected Countries .....	30
<b>WORLD TRADE SITUATION AND POLICY UPDATES:</b>	
Canada Delays Enforcement of Import Ban on “5 a Day” Logo until September 1, 2000 .....	39
Canada Initiates Anti-dumping Investigation Against U.S. Fresh Tomatoes .....	39
<b>STATISTICS:</b>	
United States: Production, Supply and Utilization of Sweet Corn .....	10
United States: Exports of Fresh, Canned and Frozen Sweet Corn .....	11
United States: Imports of Fresh, Canned and Frozen Sweet Corn .....	12
Raisins: Production, Supply and Distribution .....	17
U.S. Exports of Raisins .....	18
Walnuts: Production, Supply and Distribution in Selected Countries .....	23
U.S. Exports of Walnuts to Principal Markets .....	24
Hazelnuts: Production, Supply and Distribution .....	28
U.S. Exports of Hazelnuts to Principal Markets .....	29
Fresh Strawberries: Production, Supply and Distribution .....	35
Frozen Strawberries: Production, Supply and Distribution .....	36
U.S. Exports of Fresh Strawberries .....	37
U.S. Exports of Frozen Strawberries .....	37
U.S. Imports of Fresh Strawberries .....	38
U.S. Imports of Frozen Strawberries .....	38
Top United States Horticultural Product Exports By Value .....	40
Top United States Horticultural Product Exports By Volume .....	40
Top United States Horticultural Product Imports By Value .....	41
Top United States Horticultural Product Imports By Volume .....	41
Selected Horticultural Crop Prices Received by U.S. Growers .....	42

## **Export Summary**

### **September 2001**

U.S. exports of horticultural products to all countries in September 2001 totaled \$874 million, down 2 percent from September 2000. The only categories with increases in September were miscellaneous horticultural products (up 9.8 percent to \$151 million), fresh fruit (up 3.1 percent to \$181 million), and wine and beer (up 5.8 percent to \$65 million). All other categories declined, with double-digit declines in fresh vegetables (down 13 percent to \$76 million) and fruit and vegetable juices (down 10 percent from September 2000 to \$53 million).

September exports to Canada, the largest market, were down 3 percent from September 2000 to \$246 million. Exports to the European Union (EU) were down 1 percent to \$163 million, while shipments to Japan were down 9 percent to \$105 million. Exports to Mexico rose 4 percent from September 2000 to \$87 million. Exports to China showed the most dramatic jump for September 2001, up 63 percent from September 2000, to \$18 million. Exports in September 2001 to Hong Kong rose 15 percent to \$41 million, while exports to Korea rose 17 percent to \$22 million, and exports to Taiwan rose 1 percent to \$40 million. September 2001 exports to India and Singapore fell to \$12 million (down 17 percent) and \$9 million (down 8 percent), respectively, from September 2000.

Exports for the October-September 2000/01 period were up 5 percent from the same period in 1999/2000 to \$11.1 billion. Shipments of tree nuts show the most growth (up 14.5 percent to \$1.1 billion) for the October-September 2000/01 period. Essential oils exports were up 14.4 percent to \$677 million, fresh fruit exports were up 9 percent to \$2.2 billion, and fresh vegetable exports were up 4 percent to \$1.3 billion. The fastest growing markets for FY 2001 were: China, up 72 percent; Malaysia, up 58 percent; Mexico, up 12 percent; the Philippines, up 10 percent; Taiwan, up 10 percent, and the European Union, up 9 percent. On the other hand, exports to Japan were down 5 percent for the October-September 2000/01 period.



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## **New U.S. Trade Internet System Facilitates Public Access to Trade Data**

The public now has unlimited access to the most up-to-date data on U.S. exports and imports of agricultural, fishery, and forestry products, to the 10-digit Harmonized System (HS) classification code level. The U.S. Trade Internet System allows users the flexibility to customize their data searches and save their criteria for repeated use. Users can obtain value or volume data for selected HS codes or commodity groupings to track trends going back to 1989.

To view the site go to <http://www.fas.usda.gov/ustrade/>

For more information on the U.S. Trade Internet System, e-mail [usthelp@fas.usda.gov](mailto:usthelp@fas.usda.gov)

To access **FAS Attache Reports** on line, please go to the following Internet address:

[Http:// www.fas.usda.gov/scripts/attachrep/default.asp](http://www.fas.usda.gov/scripts/attachrep/default.asp)

Search through the country and market reports prepared by FAS attaches covering over 20 horticultural and tropical product commodities and nearly 130 countries.

## **What's New on the Homepage?**

The Horticultural and Tropical Products Division now updates its homepage weekly to bring the latest information to the public as efficiently as possible. The site contains information on policy and technical developments affecting trade in horticultural commodities, selected reports submitted by FAS overseas offices, and special reports. For further information, please contact Nancy Hirschhorn (202)720-2974. Go to <http://www.fas.usda.gov/http/>.

## Processed Sweet Corn in Selected Countries

U.S. sweet corn production for processing in Calendar Year (CY) 2001 is estimated at 2.76 million metric tons, down 4 percent from 2000, due mainly to a decline in contracted acreage and low wholesale prices. U.S. canned sweet corn (CSC) exports during the first 9 months of 2001 totaled 107,152 tons, down 18 percent from the same period in 2000. U.S. exports of CSC to Asia during the first 9 months of 2001 dropped to 74,343 tons, down 13 percent as compared to the same period last year. On the other hand, U.S. exports of frozen sweet corn to Asia are up 18 percent. The United States has also seen a major drop in CSC exports to the European Union (EU). During the first 9 months of 2001, U.S. exports to the EU totaled only 13,405 tons, down 51 percent from the same period in 2000. However, U.S. frozen sweet corn exports to the EU more than doubled in volume as compared to the same period in 2000. U.S. exports of CSC for CY 2001 are forecast at 149,174 tons, down 19 percent from 2000. U.S. exports of frozen sweet corn for CY 2001 are forecast at 51,211 tons, up 11 percent from the same period last year.

### United States

Production of sweet corn for processing in the United States in Calendar Year 2001 is estimated at 2.76 million tons, down 4 percent from 2000. A 3-percent decrease in contracted harvested acreage accompanies a 0.15 ton per hectare decrease in yield when comparing 2001 to 2000. Minnesota, which accounts for over a fourth of the U.S. sweet corn crop for processing, had a wet spring followed by several weeks of hot and dry conditions causing the crop to mature unevenly. New York's yield is low because of drought conditions. Oregon's yield is above average this year due to ideal weather conditions in the Willamette Valley, where most vegetables are grown. In western Washington, harvest was expected to be a week to ten days behind normal. In the Quincy area, winds have been prevalent this year, challenging crop development. According to the Economic Research Service (ERS), U.S. production of sweet corn for canning in 2001 is estimated at 1.40 million tons (567,654 tons, net product weight), down 15 percent from 2000. Production of sweet corn for freezing for the same period is estimated at 1.36 million tons (367,784 tons, net product weight), up 2 percent from 2000.

### Thailand

Production of CSC in Thailand in 2001 is estimated at 28,000 tons, up 8 percent from the previous year. This increase in output is attributed mainly to an expansion in planted area of sweet corn. Most sweet corn packers have increased their contracts of fresh production with farmers in response to strong export demand for CSC in 2001. Production of fresh sweet corn in MY 2001/02 is forecast



to be close to the 120,000 tons of the previous year. About 60 percent of total production will be delivered for CSC production, while the balance will be used for fresh consumption and frozen sweet corn production. Prices for fresh sweet corn are favorable in MY 2001/02 due to increased buying competition among canneries.

Regarding CSC exports, Thailand has benefitted from reduced supplies in France and the United States, and the relatively strong U.S. dollar in 2001. Thailand's CSC exports grew sharply in the first seven months of 2001 to 20,814 tons, up 31 percent from the same period in 2000. In addition to increased exports to such traditional destinations as South Korea, Taiwan, and Japan, there has been a sharp increase in new markets such as the United States and the Russian Federation. Due to its relatively cheaper prices against U.S. domestic supplies, exports to the United States have jumped from only 194 tons in the first seven months of 2000 to 1,001 tons in 2001. Meanwhile, exports to the Russian Federation grew from less than 100 tons during January-July 2000 to 1,115 tons in 2001.

Thailand has been successful in promoting exports of CSC in the past decade, from less than 500 tons in 1992 to an estimated 30,000 tons in 2001. Thailand's export markets now cover more than 60 countries, mainly in Asia and Europe. This development reflects Thailand's advantage in year-round fresh production, cheap labor costs, relative proximity to buying destination, and the strong effort by Thai entrepreneurs to improve the quality of sweet corn products. Although packers admit that it would be difficult to compete in quality with the United States, Thailand is likely to pose some threat to the United States in Asian markets in the near future. This is because continued unfavorable economic conditions may induce Asian consumers to look for acceptable-quality products with cheaper prices.

The frozen sweet corn industry in Thailand is still vulnerable due to its relative high cost operations and a lack of domestic consumption. Production of frozen sweet corn has become a profitable side line for a few prevailing frozen vegetable operators. After a sharp reduction in MY 2000/01, exports of frozen sweet corn in MY 2001/02 may recover somewhat due mainly to decreased worldwide supplies.

Thailand remains the world's largest supplier of canned baby corn. Production of canned baby corn in Thailand in 2001 is estimated at 56,000 tons, down 3 percent from the revised level in 2000, due mainly to lowering world prices as financial weakness continues among Thai packers who compete to sell their product. Fierce competition among Thai packers prevents Thailand from controlling global prices. Exports account for nearly all of Thailand's canned baby corn production. According to trade sources, the average f.o.b. export prices for Thai canned baby corn dropped from US\$ 8-13 per case in 2000 to US\$6-11 per case. In 2001, the United States continued to be Thailand's best customer for canned baby corn, followed by the Netherlands, Japan, and Germany.

## **France**

France is the leading European producer of processed sweet corn, with 85 percent of EU CSC

production and 70 percent of EU frozen sweet corn production. After a number of years of expanding production in response to increasing consumer demand, French production stabilized in 1998, due to declining consumption. This was considered due to consumer concerns regarding biotechnology.

In France, sweet corn production for processing includes canned and frozen product. In 2001, production of CSC is estimated at 243,000 tons (gross weight), nearly unchanged from the revised total of 243,800 tons in 2000. A large portion of the bulk of France's sweet corn output is slated for the export market. In 2000, the EU countries accounted for approximately 85 percent of the CSC output and 70 percent of frozen output. The decline in French domestic demand for CSC recorded in 1999 and 2000 was mainly due to French consumers' fears that sweet corn products contained genetically-modified corn. As a result, French sweet corn growers launched an educational campaign informing the public of the absence of genetically engineered corn in their production or imports into France or Europe, in hopes of raising consumption levels. Current evidence shows that French consumers remain skeptical and have reduced their purchases of processed sweet corn.

France is a net exporter of canned and frozen sweet corn, but imports products from the United States, Thailand, and Italy. In Marketing Year 2000/01, these suppliers accounted for 40, 23 and 11 percent of the French CSC market, respectively. French imports of CSC declined by 41 percent in 2000 from 1999, and shipments were reduced from each supplying country. Reportedly, French domestic demand for U.S. sweet corn is likely to grow when it is certified non-GMO. During this same period French exports totaled 104,780 tons, up 20 percent from the previous year. Germany, the United Kingdom and Spain accounted for 63 percent of total exports.

## **Germany**

As Germany's generally cold weather is not optimal for the production of sweet corn, the country produces only small amounts, which are primarily consumed fresh. Imports account for the bulk of Germany's domestic sweet corn consumption. In CY 2000, Germany imported 66,475 tons of CSC (unchanged from the previous year) and 11,637 tons of frozen sweet corn (down 4.3 percent from 1999). France continued to be the biggest supplier of CSC, although in recent years it has lost market share. In contrast, Hungary, the second most important supplier to the German market, has increased its share from 17 percent in CY 1999 to 23 percent in 2000.

In CY 2000, the United States has been able to increase its exports of CSC to Germany by 11.2 percent to 7,420 tons, which makes it the fifth largest supplier of preserved sweet corn. This is especially remarkable given the unfavorable DM/US\$ exchange rate in CY 2000. On the other hand, U.S. exports of frozen sweet corn to Germany dropped dramatically from 296 tons in CY 1999 to 51 tons in 2000, which is a decline of 83 percent.

*(The FAS Attache Report engine contains reports on processed sweet corn for 4 countries, including the United States, Thailand, France and Germany. For information on production and trade, contact Erik Hansen at 202-720-0875. For information on marketing contact Elizabeth Mello at 202-720-9903. For additional information on sweet corn, please visit our processed vegetables web page at: [http://www.fas.usda.gov/http/horticulture/Proc\\_Veg.html](http://www.fas.usda.gov/http/horticulture/Proc_Veg.html) )*

**United States: Production, Supply and Utilization of Sweet Corn**  
Metric tons

Calendar Year	1997	1998	1999	2000	2001 F
<b>Canned, Net Product Weight:</b>					
Beginning Stocks	362,981	285,471	250,240	254,218	250,203
Production 1/	593,179	611,181	643,391	661,807	567,654
Imports 2/	5,290	8,525	11,365	12,000	16,575
Total Supply	961,450	905,177	904,996	928,025	834,432
Exports 2/	193,667	187,827	184,681	185,000	149,174
Ending Stocks	285,471	250,240	254,218	250,203	211,643
Domestic Utilization	767,783	467,110	466,097	492,822	473,615
<b>Frozen, Net Product Weight:</b>					
Beginning Stocks	222,395	241,606	240,674	213,437	164,899
Production 3/	415,616	391,009	380,190	361,648	367,784
Imports 2/	12,372	13,987	11,051	12,260	8,582
Total Supply	650,383	646,602	631,915	587,345	541,265
Exports 2/	72,257	73,814	73,557	70,000	70,615
Ending Stocks	241,606	240,674	213,437	164,899	185,486
Domestic Utilization	336,520	332,114	344,921	352,446	285,164
<b>Fresh, Farm Weight:</b>					
Beginning Stocks	0	0	0	0	0
Production	1,072,356	1,193,467	1,169,653	1,175,777	1,170,288
Imports	10,433	18,143	24,086	23,451	23,134
Total Supply	1,082,789	1,211,610	1,193,739	1,199,228	1,193,422
Exports	56,519	42,457	40,416	46,131	51,211
Ending Stocks	0	0	0	0	0
Domestic Utilization	1,026,270	1,169,153	1,153,323	1,153,097	1,142,211

Source: Economic Research Service (ERS).

1/ Converted from farmweight equivalent to net product weight by using a factor of 2.463.

2/ U.S. Department of Commerce, Bureau of the Census.

3/ Converted from farmweight equivalent to net weight by using a factor of 3.7.

**United States: Exports of Fresh, Canned and Frozen Sweet Corn**  
**Calendar Year: 1997-2000**

Commodity/ Destination	1997	1998	1999	2000	(January -September) 2000	2001
	(Metric tons)					
Fresh:						
Canada	34,075	32,357	37,459	39,084	37,136	36,338
Japan	207	380	207	71	31	130
United Kingdom	2,339	1,920	1,265	3,422	2,911	2,477
Mexico	495	1,835	431	443	98	497
Switzerland	96	0	48	16	16	27
Others	15,192	5,972	1,042	3,102	873	6,091
Total	52,404	42,464	40,452	46,138	41,065	45,560
Canned:						
Asia:	128,471	113,460	113,480	116,099	84,978	74,340
Japan	60,220	61,213	60,395	56,660	39,601	39,813
Korea	19,795	11,944	19,655	28,498	23,585	13,133
Taiwan	24,101	27,331	22,598	23,538	16,019	16,286
Canada	2,173	2,162	2,020	2,283	1,465	3,012
Germany	14,472	12,813	2,729	2,111	1,395	3,098
Mexico	3,516	5,145	5,239	5,421	3,993	3,507
Netherlands	4,434	16,960	17,533	18,304	14,667	3,228
Norway	6,545	5,842	7,276	7,705	6,204	4,953
Sweden	3,759	3,646	3,851	2,754	2,101	2,012
United Kingdom	13,210	11,867	15,826	9,707	7,611	3,328
Others	41,442	28,904	27,559	18,421	13,444	14,782
Total	193,667	187,827	184,681	175,402	130,085	107,152
Total Frozen:						
Asia:	54,582	54,054	54,651	49,130	36,235	34,847
Japan	44,923	44,329	41,838	40,035	29,129	29,098
Taiwan	1,870	1,279	1,378	828	521	393
Hong Kong	5,237	5,134	4,897	2,701	1,890	1,433
Australia	759	2,483	2,226	1,636	1,524	223
Canada	4,788	3,044	3,606	7,288	3,796	5,509
Mexico	3,017	3,017	3,017	3,017	1,293	1,870
EU	3,355	4,789	4,235	4,346	2,518	4,021
Others	8,308	9,739	12,070	10,081	8,619	7,586
Total	72,257	73,814	73,267	69,932	49,290	50,133

Source: U.S. Department of Commerce, Bureau of the Census.



**United States: Imports of Fresh, Canned and Frozen Sweet Corn**  
**Calendar Year: 1997-2000**  
**Metric Tons**

Commodity/ Origin	1997	1998	1999	2000	(January - September) 2000	2001
Fresh:						
Mexico	9,492	15,690	22,308	22,129	17,523	16,656
Canada	737	2,415	1,773	1,256	1,238	1,706
Others	225	38	27	66	58	71
Total	10,454	18,143	24,108	23,451	18,819	18,433
Canned:						
Thailand	1,642	1,561	1,477	3,266	2,652	4,677
Canada	3,565	6,935	9,829	8,063	4,415	6,531
Indonesia	31	26	0	20	20	12
Others	52	3	59	729	727	112
Total	5,290	8,525	11,365	12,078	7,814	11,332
Frozen:						
Canada	11,753	13,231	10,624	8,850	6,564	5,516
Mexico	350	114	275	260	241	277
Others	269	642	152	311	233	270
Total	12,372	13,987	11,051	9,421	7,038	6,063

Source: U.S. Department of Commerce, Bureau of the Census.

## **Raisin Situation and Outlook**

Production in major raisin-producing countries in the Southern Hemisphere is expected return to normal levels in Marketing Year (MY) 2001/02. Collectively, production in Australia, Chile, and South Africa is estimated to increase by 25 percent, from 89,176 tons to 111,000 tons. Exports in the Southern Hemisphere are also expected to increase by 14 percent in 2001/02. All major raisin-producing countries in the Northern Hemisphere are projected to decrease production in MY 2000/01. Total production from the United States, Greece, Turkey, and Mexico in MY 2001/02 is estimated to decrease by 12 percent. In the United States, raisin production is expected to decrease by 21 percent to reach 325,988 tons. Overall, raisin production for selected countries is projected to decrease by 19 percent.

### **Southern Hemisphere**

#### **Australia**

In MY 2001 (March 2002/February 2003) raisin production numbers are forecast to rebound to 29,000 tons. Lower prices for grapes used for wine production in the past year have renewed interest in dried fruit production and are expected to encourage increased raisin production over the medium term. Due to a dramatic fall in production and unfavorable weather conditions, the MY 2000 (March 2001/February 2002) raisin crop is estimated to drop by more than 49 percent to 13,676 tons. In addition to unusually overcast and cooler conditions, the diversion of grapes away from raisin production in past years to wine manufacturing has cut the size of the raisin crop in half. Recent prices for sultanas are estimated at 1,600 Australian dollars per ton.

Raisin exports are estimated to increase by 18 percent in MY 2001 as a result of higher crop estimates. Due to the dramatic fall in production, Australian exports of sultanas are expected to decline in MY 2000 from 6,401 tons to 4,416 tons. During this downswing, maintaining major export markets such as Germany, New Zealand, Japan, Canada and the U.K. is expected to remain a priority for Australian exporters. Imports for MY 2001 are estimated to fall to 15,000 tons.

#### **Chile**

Raisin production for MY 2001 (January 2002 - December 2002) is forecast at 42,000 tons, a slight increase from the previous year. Decreased demand from the wine industry and larger supplies of table grapes from new vineyards is expected to increase 2000/2001 raisin production from 34,000

tons to 41,500 tons, a 22-percent increase from earlier estimates. Exports for MY 2001 are forecast at 38,400 tons. Key export markets for Chilean raisins are Mexico, the United States, Colombia, and Brazil. Export estimates for 2000/01 were revised up from the previous forecast to 38,400 tons due to a larger raisin crop. Prices for exported raisins are much higher than prices in the domestic market, leaving little incentive to produce for the local market. Chile did not import any raisins in 2000/01.

## **South Africa**

Raisin production is expected to increase by 18 percent to 40,000 metric tons in MY 2001 (January 2002 - December 2002). In MY 2000, production is anticipated to have decreased by 11 percent from the previous year due to unfavorable weather conditions and diseases.

Exports during MY 2001 are forecast to increase by 36 percent to 28,500 metric tons. Brazil and the European Union are the largest export markets for South African raisins. Exporters are also looking to increase their markets in Japan and the United States.

## **Northern Hemisphere**

### **Greece**

The MY 2001 raisin crop (September 2001 - August 2002) is estimated at 27,000 tons, a decrease of 4 percent from the previous year. Approximately 80 percent of the crop is of excellent quality, graded at No. 2 and No. 4. The MY 2000 raisin crop has been revised from 29,000 tons to 28,000 tons. Large supplies of Turkish raisins have resulted in carry overs of approximately 9,000 tons from 2000 and 2001 crops. Four thousand of the 9,000 tons are expected to be consumed domestically.

Total export volume for 2001/02 is forecast at 23,000 tons. Raisin exports for 2000/01 are expected to fall to 21,500 tons, a 7-percent decrease from the previous year, due in large part to cheaper raisins on the international market from Turkey. Presently, export prices (FOB basis) for Greek sultanas fluctuate between 275-285 Drs/Kg (\$0.75 - \$0.78/kg) for grade No 2 and 265-275 Drs/Kg (\$0.72 - \$0.75/kg) for grade No 4. Prices for Turkish sultanas range between 185-195 Drs/kg (\$0.51 - \$0.53/kg). Raisin imports are minimal with 500 tons forecast for 2001/02.

### **Turkey**

The revised raisin production forecast for MY 2001 (September 2001 - August 2002) is 190,000 tons, down 24 percent from earlier this year. Dry weather and diseases in some regions have reduced crop yields. The quality of the 2001/02 crop is not as good as the previous year, with 25 percent of the crop consisting of standard #10, 50 percent of standard #9 and the remaining 25 percent of #8 and lower. Raisin production in 2000/01 is estimated at a record 285,000 tons, a 46-percent increase

from the previous year.

The raisin export forecast for 2001/02 is revised from 210,000 to 200,000 tons due to smaller supplies. Raisin export prices have been decreasing in recent years. Currently export prices for standard #9 bulk are at \$750/MT and \$800/MT for standard #10 bulk. In 2000/01, total raisin exports are estimated to be 232,317 tons, a 21-percent increase. Imports are minimal.

### **United States**

According to the U.S. raisin industry, raisin production in MY 2001 (August 2001 - July 2002) is projected to reach 325,988 tons, down 21 percent from the record level of the previous year.

Exports are projected to increase by 10 percent in MY 2001. In MY 2000, raisin exports increased 36 percent from the previous year from 80,251 tons to 109,421 tons. The European Union, Japan and Canada remain top export markets. Imports from Chile and Mexico are expected to continue to increase in MY 2001.

In 2001/02, the Raisin Administrative Committee (RAC) received a total of \$1.9 million to market California raisins under the Market Access Program (MAP). MAP funds are expected to be used to maintain raisin markets in Japan, the United Kingdom and Scandinavia. In addition, the RAC received \$136,500 under the Emerging Markets Program to increase promotional activities in India, Poland, Czech Republic and Hungary.

### **Singapore**

Singapore is one of the most affluent nations in Asia with a present GDP-per capita of about \$22,000. More than 76 percent of its population is in the middle to upper income groups. Singapore's market for dried fruit is supplied solely by imports (approximately \$14 million), of which raisins accounted for 51 percent of the total import value. The United States is the largest supplier of dried fruits to Singapore, accounting for 66 percent of the raisin market. Iran and South Africa are also major exporters. In 1999, the United States exported more than 4,000 tons of raisins to Singapore, of which 3,094 were re-exported.

The market for dried fruits in Singapore is expected to grow slowly; however, opportunities exist in the food service and retail sectors.

### **Taiwan**

In 2000, 6,509 tons of dried fruits were imported into Taiwan, valued at \$10 million. Raisins accounted for 4,425 tons of the total imported dried fruits, of which 90 percent were imported from the United States.

Raisins are used both as snacks for consumers and ingredients for bakery stores. It is estimated that 60 percent of the imported raisins are consumed as snack products.

There are no quotas in effect for dried fruit imports. The current duty rate for bulk and boxed raisins is NT \$3/kg. The average wholesale price for raisins in 2000 is NT \$100/kg.

*(The FAS Attache Report search engine contains reports on the Dried Fruit industries for 6 countries, including Australia, Chile and South Africa. For information on production and trade, contact Rey Santella at 202-720-0897. For information on marketing contact Kristin Kezar at 202-690-0556. Also, visit the dried fruit webpage at: <http://www.fas.usda.gov/http/horticulture/driedfrt.html>)*



**RAISINS: PRODUCTION, SUPPLY, AND DISTRIBUTION**  
Marketing Years 1997/98 - 2001/02  
(Metric Tons)

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Exports	Domestic Consumption 2/	Ending Stocks
<b>NORTHERN HEMISPHERE</b>						
<b>Greece</b>						
1997/1998	3,930	38,000	2,000	37,000	4,000	2,930
1998/1999	2,930	28,000	4,000	24,000	4,500	6,430
1999/2000	6,430	22,500	1,000	23,000	4,500	2,430
2000/2001	2,430	28,000	1,000	21,500	4,000	5,930
2001/2002	5,930	27,000	500	23,000	9,000	1,430
<b>Turkey</b>						
1997/1998	15,273	240,000	3,090	192,770	37,000	28,593
1998/1999	28,593	250,000	3,131	188,247	30,000	63,477
1999/2000	63,477	195,000	1,550	192,433	30,000	37,594
2000/2001	37,594	285,000	1,000	210,000	30,000	61,277
2001/2002	61,277	190,000	1,000	200,000	30,000	22,277
<b>Mexico</b>						
1997/1998	0	18,000	6,130	7,265	16,865	0
1998/1999	0	20,000	4,474	13,142	11,332	0
1999/2000	0	12,000	8,278	7,783	12,495	0
2000/2001	0	16,000	8,000	7,500	16,500	0
2001/2002	0	15,000	7,000	9,000	13,000	0
<b>United States</b>						
1997/1998	89,940	388,729	11,194	120,433	223,157	146,273
1998/1999	146,273	251,290	24,579	110,591	213,341	98,210
1999/2000	98,210	310,653	17,370	80,251	220,761	125,221
2000/2001	125,221	412,770	11,000	115,000	239,272	194,719
2001/2002*	194,719	325,988	N A	N A	N A	N A
<b>Total Northern Hemisphere</b>						
1997/1998	109,143	684,729	22,414	357,468	281,022	177,796
1998/1999	177,796	549,290	36,184	335,980	259,173	168,117
1999/2000	168,117	540,153	28,198	303,467	267,756	165,245
2000/2001	165,245	741,770	21,000	354,000	289,772	261,926
2001/2002	261,926	557,988	8,500	232,000	52,000	23,707
<b>SOUTHERN HEMISPHERE</b>						
<b>Australia</b>						
1997/1998	4,000	38,500	11,481	14,485	32,196	7,300
1998/1999	7,300	21,119	16,885	5,599	35,105	4,600
1999/2000	4,600	26,667	17,353	6,401	35,300	6,919
2000/2001	6,919	13,676	17,400	4,416	32,579	1,000
2001/02	1,000	29,000	15,000	5,200	35,000	4,800
<b>Chile</b>						
1997/1998	3,041	27,820	0	27,017	3,500	344
1998/1999	344	36,000	0	32,563	3,500	281
1999/2000	281	45,000	0	41,576	3,500	281
2000/2001	281	41,500	0	38,000	3,500	181
2001/02	205	42,000	0	38,400	3,500	305
<b>South Africa; Republic of</b>						
1997/1998	10,306	27,063	0	20,200	11,425	5,744
1998/1999	5,744	40,358	0	28,214	12,600	5,288
1999/2000	5,288	38,142	1	24,670	13,000	5,761
2000/2001	5,761	34,000	1	21,000	13,000	5,762
2001/02	9,506	40,000	1	28,500	13,500	7,507
<b>Total Southern Hemisphere</b>						
1997/1998	17,347	93,383	11,481	61,702	47,121	13,388
1998/1999	13,388	97,477	16,885	66,376	51,205	10,169
1999/2000	10,169	109,809	17,354	72,647	51,800	12,961
2000/2001	12,961	89,176	17,401	63,416	49,079	6,943
2001/02	10,711	111,000	15,001	72,100	52,000	12,612
<b>Grand Total</b>						
1997/1998	126,490	778,112	33,895	419,170	328,143	191,184
1998/1999	191,184	646,767	53,069	402,356	310,378	178,286
1999/2000	178,286	649,962	45,552	376,114	319,556	178,206
2000/2001	178,206	830,946	38,401	417,416	338,851	268,869
2001/2002	272,637	668,988	23,501	304,100	104,000	36,319

1/ Northern Hemisphere marketing years begin August 1, and September 1 in Turkey. Marketing years for Southern Hemisphere raisins, (which are harvested early in the second of the split years shown) begin Jan. 1, and March 1 in Australia.  
2/ Domestic consumption figures include raisins used for feed and distillation purposes. 3/ Imports include currants.  
3/ Imports include currants.  
4/ \*Industry Estimate

**U.S. EXPORTS OF RAISINS**  
**Complete Marketing Year (August/July) 1998/99 - 2000/01**  
**and 1999/00-2000/01 August/July Comparisons**  
**(Metric Tons )**

Destination	1998/99	1999/00	2000/1	Percent Changed
<b>North America</b>				
Canada	12,121	10,723	11,793	10%
Mexico	896	1,173	644	-45%
<b>Subtotal</b>	<b>13,017</b>	<b>11,896</b>	<b>12,437</b>	<b>5%</b>
<b>European Union</b>				
Sweden	4,368	3,527	4,805	36%
Finland	2,270	1,725	1,614	-6%
Denmark	5,148	3,797	3,871	2%
United Kingdom	22,195	11,439	24,174	111%
Netherlands	3,471	2,794	5,569	99%
France	669	625	275	-56%
Germany	5,092	3,280	7,195	119%
Spain	587	499	505	1%
Belgium-Lux.	926	708	889	26%
Italy	220	117	320	174%
Ireland	243	75	78	4%
<b>Subtotal</b>	<b>45,189</b>	<b>28,586</b>	<b>49,295</b>	<b>72%</b>
<b>Asia</b>				
Singapore	2,776	1,919	2,104	10%
Malaysia	686	557	927	66%
Korea, Republic of	1,654	1,122	2,304	105%
Hong Kong	1,763	1,378	2,436	77%
Taiwan	3,887	2,697	3,835	42%
Japan	30,014	23,224	22,905	-1%
<b>Subtotal</b>	<b>40,780</b>	<b>30,897</b>	<b>34,511</b>	<b>12%</b>
<b>Other Countries</b>				
New Zealand	1,312	988	1,319	34%
Norway	2,309	2,045	2,384	17%
All Others	7,984	5,839	9,475	62%
<b>Grand Total</b>	<b>110,591</b>	<b>80,251</b>	<b>109,421</b>	<b>36%</b>

Source: U.S. Bureau of the Census

## Walnut Situation and Outlook

Walnut production in selected countries in 2001/02 is forecast at 708,262 metric tons, 4 percent above the previous year's output, due primarily to a larger U.S. crop. Exports from China, the world's largest producer, are forecast to remain stable, due to strong domestic demand. World walnut supplies are forecast to increase by 3 percent with a major increase in U.S. production of walnuts. This will likely lower U.S. grower prices, which fell 49 percent from 1996/97 to 1999/00. With expected lower world prices and significantly larger U.S. production of walnuts compared to the previous year, both world consumption and U.S. exports are forecast to increase. The United States is the world's second largest walnut producer and the largest exporter.

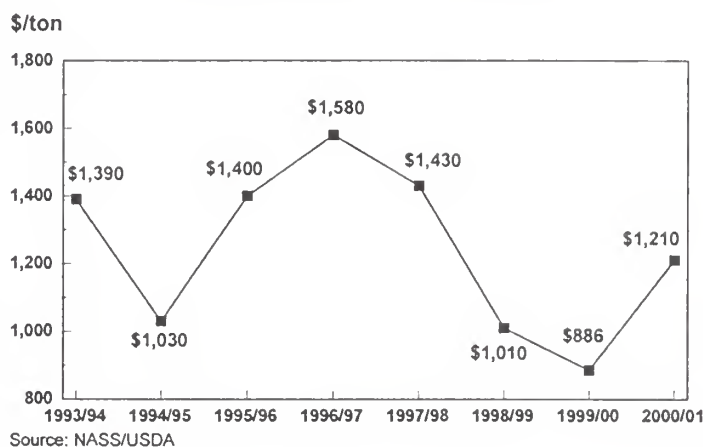
### United States

The 2001/02 U.S. walnut crop is forecast at 254,012 tons, 17 percent above last year's crop, due to the alternate-bearing nature of the crop. U.S. exports in 2001/02 are expected to reach 108,611 tons, up 5 percent from the previous year, due to higher production and strong worldwide demand. In 2000/01, U.S. grower prices increased 37 percent from the previous year, reversing a three-year declining trend. The major increase in U.S. production of walnuts forecast for 2001/02 is expected to lower grower prices once again. However, this should spur world consumption and contribute to higher levels of U.S. exports in 2001/02. Shipments to Mexico,

Australia, Egypt, and some Latin America countries were down in 2000/01 from 1999/00 but were up for Canada, Japan, Israel and the major European markets.

The 2001/02 walnut crop is on the way to being the second largest on record and is expected to contain probably the best quality of any walnut crop harvested in California. This large quality crop, combined with support from the Market Access Program (MAP), as well as publicity following the publication of the several health studies showing the health benefits associated with walnut consumption, is expected to translate into a good export year for walnuts. Exports to MAP-targeted

**Grower Price of U.S. Walnuts  
Increased 37% in 2000/01**



countries of Canada, Germany, Italy, Israel, Japan, Korea and Spain are all slated to grow from 5 to 20 percent over the next 3 years. Spain, Japan, and Germany are still the top three markets, reflecting the strong consumer base in these countries. Also, Germany is the traditional trade center for nuts.

## **China**

China's walnut production has increased for the last several years because of increased planting and bearing acreage, improved walnut varieties, and better tree management. Walnut production in 2000/01 surpassed the initial forecast by 10,000 tons. This was primarily due to the bearing cycle of walnut trees in Southern China and to very favorable weather conditions. However, walnut production in 2001/02 is forecast at 310,000 tons, the same as last year, due mainly to unfavorable weather conditions and the downturn in the bearing cycle of walnut trees. While there is no official data on walnut consumption, it is believed that most walnut consumption takes place in areas of production. The exception is that as walnut demand increases in some urban areas or during holidays such as the Chinese mid-Autumn festival, provincial trade increases to meet growing domestic consumption. It is estimated that 75 to 80 percent of domestically produced walnuts are sold raw each year to individual consumers. There is another estimated 10 to 20 percent of walnuts sold to processors. It is expected, however, that as Chinese companies refine processing technology, processed walnuts will gain some ground in domestic sales. Growing production and stable exports indicate that walnut consumption is growing. This increase is attributable mainly to rising incomes of many Chinese, who not only are demanding greater diversification in snack food preferences and baked goods, but also are becoming increasingly aware of the health benefits of nuts.

China's walnut imports have decreased. However, one trend surfacing is an increase in the volume of imported walnuts of Chinese origin. This occurs when a company within a special economic trading zone may have purchased walnuts from a production base within China. Then, a Chinese importing company may purchase walnuts from this company. The company then sends walnuts from the production base to the procurer and the paperwork gets routed through these special trading zones.

The volume of Chinese exports continues to grow. However, as a percentage of production, walnut exports have been stable. Traders have mixed sentiments regarding whether growing domestic consumption will have a negative impact on China's ability to export walnuts in the future. Traders report that China's market share of international walnut trade is shrinking. Chinese traders feel this is because of the increased production and exports from regional competitors, particularly India. Major export markets of shelled walnuts include the United Kingdom, Canada, Japan and France.

## **Turkey**

The 2001/02 Turkish walnut crop is forecast at 68,000 tons, a slight decrease from last year. This was due mainly to unusually hot and dry weather conditions. Walnuts grow naturally throughout most of Turkey and in the past, they were generally not cultivated but simply harvested from natural forests. However, during the last couple of decades, increasing demand and prices have made walnut



cultivation more attractive, leading to increased investment in cultivation. The lack of a systematic crop survey and widely divergent estimates from government and non-official sources make it difficult to accurately estimate production. However, sources agree that walnut production is expected to gradually rise in the next 3-5 years, as new trees with improved varieties reach bearing age and acreage is increased. Per capita consumption is relatively stable in Turkey, with 50 percent of the crop production used for home consumption and the remainder marketed. Most of the marketed walnuts are consumed whole, with only a limited amount being processed. Walnut trade is very limited. Most imports are inexpensive, lower quality nuts from neighboring countries. Higher quality domestic nuts are usually exported.

## **India**

India's 2001/02 walnut production is forecast at 28,000 tons, a decrease of 10 percent from last year's record crop. This is due to lower yields caused by early-season drought and the trees' alternating bearing cycle. Exports are expected to decline to 14,000 tons based on lower domestic supplies and forecast to re-surge to 16,000 tons in 2002/03 based on forecast record production. The current year (2000/01) export estimate has been raised 11 percent to 15,500 tons, based on strong demand from the EU and the United States (due to a smaller crop). Major export destinations during the Indian fiscal years 1999 and 2000 were Spain, Egypt, Germany, Netherlands, U.K., Greece, Italy, and the United States. There are no restrictions on walnut exports and no government export subsidies. Given the high tariffs and strong domestic production, there are few opportunities for imports.

## **France**

In 2001/02, France's walnut production is forecast at 28,000 tons, close to its 2000/01 level. While the weather during the growing period has been favorable, storms in August 2001 have damaged the walnut crop in some regions, but it is still difficult to fully assess their impact. The crop is expected to be of average quality. According the various studies by the French Fruits and Vegetables Technical Institute (CTIFL), French walnut consumption has been relatively stable for several years, at around 17,000 tons. No significant change in consumption is expected for 2001/02.

The 2001/02 import demand for walnuts in France is not forecast to increase significantly, as the crop would be similar to last year. French imports of U.S. in-shell walnuts fell sharply in 2000/01, as the hike in value of the U.S. dollar made U.S. in-shell walnuts uncompetitive compared to shelled eastern European or Chinese walnuts, despite the superior quality of U.S. walnuts. For the same reason, French walnut exports rose significantly in 2000/01, especially to Spain. The United States lost its rank as France's leading supplier of in-shell walnuts in 2000/01, replaced by Moldova and Austria, whereas Moldova provided the bulk of shelled imports. Germany is traditionally France's principal export market for walnuts, although sales declined in 2000/01. Spain is also becoming a large customer for French in-shell walnuts.



## Italy

The 2001/02 crop is forecast at 8,000 tons, down 50 percent from the previous year, due to the cyclical nature of the crop and weather developments. Weather conditions have been unfavorable, with cold temperatures reported in mid-April (following a period of unusually warm temperatures), which negatively affected the walnut trees. Production is not expected to expand in the near future, due to declining acreage and lower productivity of older trees. Italy's walnut imports for 2001/02 are expected to increase 67 percent, due to decreased domestic supplies. Excluding minor quantities from France and eastern Europe, most of Italy's imports are U.S. in-shell walnuts, which have accounted for over 80 percent of total in-shell shipments in the past 2 years.

## Chile

Chile's 2001/02 walnut crop is forecast to increase 4 percent to 12,250 tons as a result of grafting of existing orchards to higher-yielding varieties, replacement of uprooted orchards with improved varieties, and overall increases in planted area. Exports are forecast to increase slightly in 2001/02, as a result of the higher output. Export volume is also expected to rise in the coming years, reflecting the forecasted expansion in production and better quality, once improved orchards come into bearing. Brazil is the largest Chilean export market both for in-shell and shelled walnuts, far surpassing any other market. Argentina is the second largest market for both in-shell and shelled walnuts. Exports are highly dependent upon Brazilian demand and prices. Only minute volumes of the highest-quality nuts, which can meet the often demanding size and grade specifications of customers such as Germany, are exported to Europe.

*The FAS Attaché Report search engine contains detailed reports on Tree Nut Competition or Market Intelligence for 16 countries, including Chile, China, France, India, Italy, and Turkey. (For information on production and trade, contact Erik Hansen at 202-720-0875. For information on marketing contact Ingrid Mohn at 202-720-5330. Also, visit the tree nuts web page at: <http://www.fas.usda.gov/http/horticulture/nuts.html>)*

**WALNUTS: PRODUCTION, SUPPLY AND DISTRIBUTION IN SELECTED COUNTRIES**

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Total Supply and Distribution	Exports	Domestic Consumption	Ending Stocks
<b>Metric tons, in-shell basis</b>							
<b>Chile</b>							
1998/99	246	11,300	1	11,547	9,841	1,470	236
1999/00	236	10,000	113	10,349	8,700	1,545	104
2000/01	104	11,800	100	12,004	10,000	1,800	204
2001/02	204	12,250	100	12,554	10,500	1,800	254
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>China</b>							
1998/99	0	251,000	700	251,700	27,000	224,700	0
1999/00	0	274,246	2,582	276,828	29,398	247,430	0
2000/01	0	310,000	500	310,500	32,500	278,000	0
2001/02	0	310,000	1,000	311,000	33,000	278,000	0
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>France</b>							
1998/99	0	24,600	9,500	34,100	16,000	18,100	0
1999/00	0	29,045	11,800	40,845	20,500	20,345	0
2000/01	0	27,800	12,200	40,000	23,000	17,000	0
2001/02	0	28,000	12,000	40,000	21,000	19,000	0
2002/03 F	0	27,000	12,000	39,000	21,000	18,000	0
<b>India</b>							
1998/99	7,850	30,000	0	37,850	12,350	15,000	10,500
1999/00	10,500	28,000	0	38,500	12,000	16,500	10,000
2000/01	10,000	31,000	0	41,000	15,500	17,000	8,500
2001/02	8,500	28,000	0	36,500	14,000	17,000	5,500
2002/03 F	5,500	32,000	0	37,500	16,000	17,500	4,000
<b>Italy</b>							
1998/99	1,500	12,000	15,194	28,694	989	26,705	1,000
1999/00	1,000	18,000	18,000	37,000	1,800	29,200	6,000
2000/01	6,000	16,000	12,000	34,000	1,500	29,500	3,000
2001/02	3,000	8,000	20,000	31,000	1,000	28,000	2,000
2002/03 F	2,000	13,000	16,000	31,000	1,000	28,000	2,000
<b>Turkey</b>							
1998/99	4,500	70,000	2,000	76,500	500	69,000	7,000
1999/00	7,000	70,000	5,000	82,000	500	72,500	9,000
2000/01	9,000	69,000	8,000	86,000	500	75,500	10,000
2001/02	10,000	68,000	8,000	86,000	500	76,000	9,500
2002/03 F	9,500	70,000	7,000	86,500	500	77,000	9,000
<b>U.S.A. 2/ 3/ 4/ 5/</b>							
1998/99	74,099	205,931	171	280,201	99,552	116,684	63,965
1999/00	63,965	256,734	194	320,893	98,199	155,765	66,929
2000/01	66,929	216,817	200	283,946	103,273	119,334	61,339
2001/02 F	61,339	254,012	224	315,575	108,611	131,075	75,889
2002/03	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>Total</b>							
1998/99	88,195	604,831	27,566	720,592	166,232	471,659	82,701
1999/00	82,701	686,025	37,689	806,415	171,097	543,285	92,033
2000/01	92,033	682,417	33,000	807,450	186,273	538,134	83,043
2001/02	83,043	708,262	41,324	832,629	188,611	550,875	93,143
2002/03 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A

1/ Marketing Years March - Feb. for Chile; Aug. -July for the United States; Sept. -Aug. for Italy and Turkey; Oct - Sept. for

China, France, and India

2/ U.S. export and import data come from the Bureau of the Census with forecasts by Foreign Agricultural Service (FAS)/USDA

3/ U.S. domestic shelling ratios for U.S. exports and imports for 1998/99, 1999/00 are .414 and .416 respectively and originate from National Agricultural Statistics Service (NASS)/USDA For 2000/01 and 2001/02, FAS used shelling ratios of .412 and .414 respectively, averages based on the preceding three years

4/ U.S. stock data comes from the Walnut Marketing Board (WMB).

5/ U.S. production forecast for 2001/02 by NASS.

F=Forecast

SOURCES U.S. Agricultural Attache Reports, Bureau of the Census, WMB, and NASS/USDA

**U.S. Exports of Walnuts to Principal Markets 1/  
Marketing Years 1996/97 - 2000/01**

<b>Destination</b>	<b>1996/97</b>	<b>1997/98</b>	<b>1998/99</b>	<b>1999/00</b>	<b>2000/01</b>
<b>metric tons, shelled and in-shell total</b>					
Argentina	611	209	237	287	138
Australia	1,371	2,129	1,749	1,582	1,410
Bahamas; The	12	21	14	13	0
Bahrain	0	0	0	0	10
Bermuda	15	19	14	11	0
Brazil	3,014	1,248	1,740	1,070	889
Canada	4,670	4,148	3,984	4,834	5,361
Chile	20	0	0	0	202
China	10	0	0	152	0
Costa Rica	2	5	1	11	12
Ecuador	248	149	181	96	108
Egypt	309	730	136	480	400
European Union	52,161	41,208	38,894	34,709	41,283
Guatemala	6	8	21	23	77
Hong Kong	161	196	127	671	68
Israel	2,483	3,439	2,629	3,034	3,184
Japan	10,941	7,979	7,157	9,248	12,657
Korea; Republic of	727	1,568	272	598	1,340
Malaysia	17	1	0	14	2
Malta & Gozo	129	207	93	60	132
Mexico	242	3,568	7,210	2,588	2,458
New Zealand	94	98	64	55	48
Norway	539	523	341	255	502
Panama	66	22	190	73	65
Peru	0	0	19	9	0
Philippines	42	20	49	90	156
Saudi Arabia	20	1	1	48	26
Singapore	31	163	54	61	41
South Africa	55	75	21	21	30
Switzerland	320	272	348	34	74
Taiwan	712	1,062	1,111	1,034	1,094
United Arab Emirates	0	0	70	0	27
Uruguay	27	9	22	33	21
Venezuela	311	1,062	565	699	1,092
Other Countries	96	130	142	1,061	351
<b>Grand Total</b>	<b>79,460</b>	<b>70,269</b>	<b>67,458</b>	<b>62,957</b>	<b>73,258</b>

1/ Marketing years, August - July.

Note: All data from the Bureau of the Census.

## Hazelnut Situation and Outlook

Hazelnut production in selected countries in 2001/02 is forecast to increase 38 percent to 843,817 metric tons, due to increased output in all major hazelnut-producing countries. Total world hazelnut supply has also increased, although not as significantly, due to an increase in world production and Turkey's larger carryover stocks. Total exports from selected countries in 2001/02 are forecast to increase 12 percent to 520,750 tons, due to higher production in all countries. U.S. hazelnut exports are forecast at 27,750 tons, 122 percent above last year due to a much larger crop. Future world production and supplies will be strongly influenced by the outcome of Turkey's implementation of International Monetary Fund's (IMF) reforms to gradually phase out its hazelnut support price.

### United States

U.S. hazelnut production in 2001/02 is forecast at 43,817 tons, up 113 percent from the previous year's harvest and 22 percent above 1999/00 production. This is due to the crop's alternate bearing cycle and good weather conditions. Virtually all of the expected production will come from Oregon, except for an estimated 270 tons from Washington. In fact, Oregon's production is expected to be a record for the second time in the past four years. Oregon's previous record was 42,638 tons in 1997. Exports in 2001/02 are forecast at 27,750 tons, 122 percent above the previous year's shipments, due to the much larger output. However, U.S. exports will face increased international competition from lower-priced Turkish product, as Turkey gradually phases out price supports to FISKOBIRLIK (The Union of Hazelnut Sales Cooperative). Hazelnut prices are expected to remain relatively stable, despite higher production.

### Turkey

Turkey is the world's largest hazelnut producer, accounting for about 70 percent of world supply. The 2001/02 crop is forecast at 630,000 tons, up 29 percent from last year, due to favorable weather conditions before harvest. Hazelnut production is one of the most important economic activities in the country, employing an estimated 385,000 growers. Of these, most grow hazelnuts to supplement their primary income, own about 1 to 2.5 hectares, and use family labor at harvest. Only a few large growers rely solely on hazelnut production as their primary income. There are approximately 536,000 hectares in production, although this is difficult to determine, given the lack of systematic crop surveys.

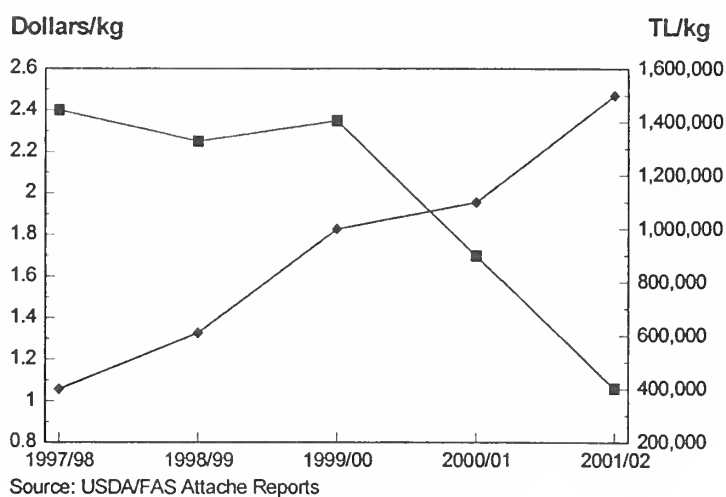
Following through on its commitments to the International Monetary Fund (IMF) to reduce inflation, the Government of Turkey (GOT) is trying to reduce the large production surplus, by gradually



lowering the hazelnut support price. On August 18, 2001, the general director of FISKOBIRLIK announced the MY 2001/02 procurement prices, which are differentiated by the type of hazelnut. Levant type hazelnuts, which are an estimated 70-80 percent of the total production will receive the support price of TL 1,500,000. (\$1.06/kg), which represents a 36-percent increase in nominal terms from last year's price of TL 1,100,000 (\$2.30/kg). The announcement has not been well received by growers. Although the MY 2001 price is 36 percent higher in nominal terms

that it was the previous year, inflation was 65 percent during the last 12 months and devaluation of the Turkish Lira at about 225 percent. FISKOBIRLIK is expected to procure between 100,000 and 150,000 tons of hazelnuts in 2001/02, although the quantity purchased will be determined by the amount and timeliness of payments provided by the GOT.

## FISKOBIRLIK'S Procurement Price



Turkey accounts for more than 80 percent of the world hazelnut trade and, through FISKOBIRLIK, largely determines world export prices. Indicative export prices in early August were around \$280.00 per 100 kilograms compared to \$300.00 a year earlier. Export prices dropped recently to \$225.00 after FISKOBIRLIK announced the new procurement price. In 2001/02, exports are forecast at 420,000 tons, up 4 percent from last year. Although 78 percent of Turkish exports go to the EU, Turkey is trying to expand markets in Asia, the former Soviet Union countries, as well as the United States, where it is involved in a joint promotion program with U.S. growers to increase U.S. hazelnut consumption. About 70 percent of Turkey's hazelnut exports comprise raw kernels, with the remaining 30 percent being processed kernels, including roasted, sliced, chopped, paste, meal, and flour.

### Italy

Hazelnut production in 2001/02 is forecast at 135,000 tons, 63 percent above last year's poor crop, due to cyclical crop fluctuation and favorable weather conditions. Imports are expected to decrease 25 percent, due to increased production. Imports of shelled hazelnuts from the United States and Turkey dropped to zero in 2000/2001, due to the cheap price of Turkish product and increased supplies of competing hazelnuts from the EU. Exports for 2001/02 are forecast at 3,000 tons, 36 percent above last year's level, due to the larger crop. In 2000/01, exports fell by 14 percent, due



primarily to aggressive Turkish competition in Italy's main hazelnut export markets (Germany, France, and Switzerland). Reduced domestic supplies in 2000/01 (due to the poor Italian crop) strengthened the market, and prices of Italian hazelnuts averaged about 13 percent more than the previous year, despite the increasing imports of shelled hazelnuts from Turkey. The forecast of large crops both in Turkey and Italy, on the other hand, will likely depress the market during the next marketing year.

The EU program favoring domestic hazelnut producers (which provided payment of 15 EUROS per 100 kg., in-shell basis) has expired and no new support actions have been adopted by the EU for the hazelnut industry. This is despite strong grower support for these measures in order to counteract competition from Turkey. The EU Commission will probably produce a draft proposal by the end of this year, to be discussed by the Council next year, although budget constraints will limit the impact of such a new policy initiative.

## Spain

The 2001/02 hazelnut crop in Spain is forecast to increase substantially to a record 35,000 tons, more than double last year's crop of 16,000 tons, due to the crop's alternate bearing cycle and unusually rainy weather during the summer of 2001. Hazelnut exports are expected to increase and imports are expected to decrease as a result of the much larger crop. The United States represents about 5 percent of Spain's total hazelnut imports and continues to face stiff competition from lower-priced Turkish product, which accounts for 65 percent of Spain's imports. All Turkish hazelnut exports to Spain are shelled, while U.S. exports are in-shell. The bulk of the hazelnut crop is consumed in-shell, with the confectionary and chocolate industries consuming 60-70 percent of total supplies.

While there is no price support program for tree nuts, the EU does have an improvement plan that is implemented in both Spain's hazelnut and almond sectors. Up to 475 ECU/hectare can be provided to growers for varietal improvement of their orchards. The Government of Spain and industry continue to seek an extension of the Program until the implementation of the new fruit and vegetable regime begins, in principle scheduled for 2003. Spanish nut growers have been very vocal in arguing for an extension of this program. Given competition from Turkish product, Spanish hazelnut growers consider this program vital to their future competitiveness and are expected to oppose the most recent EU proposal for reform of the fruit and vegetable regime, which calls for a significant cut in subsidies.

*The FAS Attaché Report search engine contains detailed reports on Tree Nut Competition or Market Intelligence for 16 countries, including Turkey, Italy, and Spain. (For information on production and trade, contact Erik Hansen at 202-720-0875. For information on marketing contact Ingrid Mohn at 202-720-5330. Also, visit the tree nuts web page at: <http://www.fas.usda.gov/horticulture/nuts.html>)*

# HAZELNUTS: PRODUCTION, SUPPLY AND DISTRIBUTION

Country/ Marketing Year 1/	Beginning Stocks	Production	Imports	Total Supply	Exports	Domestic Consumption	Ending Stocks
Metric tons, in-shell basis							
<b>Italy</b>							
1998/99	15,000	118,000	32,367	165,367	51,044	112,323	2,000
1999/2000	2,000	110,000	44,000	156,000	35,000	119,000	2,000
2000/01	2,000	83,000	56,000	141,000	33,000	106,000	2,000
2001/02	2,000	135,000	40,000	177,000	50,000	123,000	4,000
2002/3 F	4,000	100,000	50,000	154,000	35,000	117,000	2,000
<b>Spain</b>							
1998/99	0	10,000	9,300	19,300	6,700	12,600	0
1999/2000	0	25,000	9,700	34,700	14,000	17,200	3,500
2000/01	3,500	16,000	10,000	29,500	13,000	16,000	500
2001/02	500	35,000	7,000	42,500	23,000	18,500	1,000
2002/3 F	1,000	20,000	10,000	31,000	12,000	18,000	1,000
<b>Turkey</b>							
1998/99	100,000	625,000	2,254	727,254	347,477	104,777	275,000
1999/2000	275,000	610,000	3	885,003	397,613	187,390	300,000
2000/01	300,000	490,000	0	790,000	406,000	169,000	215,000
2001/02	215,000	630,000	0	845,000	420,000	200,000	225,000
2002/3 F	225,000	600,000	0	825,000	425,000	200,000	200,000
<b>United States 2/ 3/ 4/ 5/</b>							
1998/99	1,723	14,061	14,195	29,979	11,429	18,447	103
1999/2000	103	34,500	14,996	49,599	13,093	32,403	4,103
2000/01	4,103	20,412	14,500	39,015	12,500	24,515	2,000
2001/02	2,000	43,817	14,990	60,807	27,750	26,884	6,173
2002/3 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A
<b>Total</b>							
1998/99	116,723	767,061	58,116	941,900	416,650	248,147	277,103
1999/2000	277,103	779,500	68,699	1,125,302	459,706	355,993	309,603
2000/01	309,603	609,412	80,500	999,515	464,500	315,515	219,500
2001/02	219,500	843,817	61,990	1,125,307	520,750	368,384	236,173
2002/3 F	N/A	N/A	N/A	N/A	N/A	N/A	N/A

1/ Marketing Years: July-June for the United States; September -August for Spain, Italy, and Turkey.

2/ U.S. export and import data are from the Bureau of the Census with forecasts by the Foreign Agricultural Service (FAS)/USDA.

3/ The U.S. domestic shelling ratios for exports and imports are .403, .388, .391 and .399 for 1998/99, 1999/00, 2000/01, and 2001/02 respectively and originate from the National Agricultural Statistics Service (NASS)/USDA.

4/ U.S. stock data comes from the Hazelnut Marketing Board (HMB)

5/ The 2001/2002 production forecast comes from NASS.

F= Forecast.

SOURCES: USDA's Foreign Agricultural Service (FAS) Agricultural Attaché Reports, Bureau of the Census, HMB, and NASS/USDA.

**U.S. Exports of Hazelnuts to Principle Markets /1**  
**Marketing Years 1996/97 - 2000/01**

<b>Destination</b>	<b>1996/97</b>	<b>1997/98</b>	<b>1998/99</b>	<b>1999/00</b>	<b>2000/01</b>
<b>Metric Tons, Shelled and In-Shell</b>					
Australia	400	497	224	227	84
Brazil	910	661	336	404	255
Canada	1,064	1,285	913	805	886
China /2	2,865	3,916	1,760	4,377	7,711
Egypt	128	382	321	382	230
EU	5,340	9,283	4,656	2,360	3,438
Israel	379	954	211	445	451
Japan	27	75	91	42	16
Korea	0	32	70	49	95
Mexico	362	528	318	444	406
Saudi Arabia	0	67	0	0	17
Switzerland	5	49	42	0	0
Taiwan	2	0	9	92	22
UAE	15	20	20	17	34
Venezuela	166	196	263	497	425
Other Countries	455	613	163	144	352
<b>Grand Total</b>	<b>12,118</b>	<b>18,558</b>	<b>9,397</b>	<b>10,285</b>	<b>14,422</b>

/1 - Marketing years: July - June

/2 - Includes Hong Kong

Source: All data from the U.S. Census Bureau

## **Strawberry Situation and Outlook**

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**Fresh strawberry production in major producing countries is forecast to decline in Marketing Year (MY) 2001. Canada and Spain are the only countries that expect to have production levels increase or remain the same as last year. Total worldwide exports of fresh strawberries are expected to fall due to lower international prices in MY 2001. Frozen strawberry production in selected countries closely mirror MY 2000 levels.**

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### **Canada–Fresh Strawberries**

In light of expected favorable weather conditions, strawberry production in Marketing Year (MY) 2001 (April 2002/March 2003) is forecast to remain at 25,000 tons, the same as last year's crop. In MY 2000 all regions except for British Columbia are expected to increase production. Imports provide the bulk of the domestic supplies for fresh strawberries whereas the domestic production only supplies one-third of the entire domestic Canadian fresh strawberry market.

The Canadian import market for fresh strawberries is dominated by the United States, which holds a 97-percent market share. Fresh strawberry imports for MY 2001 are estimated at 50,000 tons, a 4-percent increase from MY 2000. The Canadian dollar remains weak vis-a-vis the U.S. dollar resulting in higher retail prices for imported fresh strawberries. Increased competition from Argentina and Chile could cut into U.S. fresh strawberry sales.

Under the North American Free Trade Agreement (NAFTA), fresh strawberries from the United States and Mexico enter Canada duty-free. The Canada/Chile Free Trade Agreement provides free access for fresh strawberries from Chile. A new directive will permit the importation of fresh strawberries from Argentina on a two-year trial basis.

### **Canada–Frozen Strawberries**

Production of frozen strawberries is forecast at 2,600 tons in MY 2001 (April 2002/March 2003), a 4-percent increase from MY 2000. Total import demand for frozen strawberries, particularly from the United States and Mexico, decreased in MY 2000 and is expected to continue in MY 2001. Imports from the U.S. fell 5 percent while Mexican imports dropped by 3 percent in the first eight months (January - August) of calendar year 2000.

Under NAFTA all import duties on U.S. frozen strawberries, including any seasonal duties, were reduced to zero on January 1, 1998. Frozen strawberries from Mexico are assessed a duty of 1.3 Canadian cents/kg, but not less than 2 percent, until the duties are eliminated on December 31, 2002.



Chilean frozen strawberries face a duty of 1.7 Canadian cents/kg, but not less than 2.5 percent. These tariffs will be phased out by 2003.

### **Mexico–Fresh Strawberries**

Mexico's fresh strawberry production in MY 2001 (August 2001/July 2002) is forecast at 119,000 tons, a 2-percent decline from the previous year. According to the industry, there has been a trend to reduce strawberry plantings due to lower market prices, credit unavailability and increased production costs. The MY 2000 strawberry crop was revised downward from 141,000 tons to 121,000 tons as fewer hectares were planted.

As a result of increasing international demand, fresh strawberry exports for MY 2001 are forecast at 34,000 metric tons, a 13-percent increase from MY 2000. The estimate for MY 2000 exports fell from 42,000 tons to 30,000 tons due to higher production costs and weak demand in the early part of the marketing year. Fresh strawberry imports for MY 2001 are expected to be 9,000 tons. The United States is the largest fresh strawberry import supplier for the Mexican market and delivers most of its products from May through November. Strawberry imports were revised upward from 5,000 tons to 9,000 tons in MY 2000, as a result of stronger demand generated by the continued strength of the peso.

### **Mexico–Frozen Strawberries**

Frozen strawberry production in MY 2001 is forecast at 45,000 tons, an increase of 5 percent from MY 2000, but lower than MY 1999 levels. Low international prices for frozen strawberries are driving down production of frozen strawberries. MY 2000 crop estimates were revised downward due to lower international demand, reduced plantings, lower prices and a glut of global supplies.

Exports of frozen strawberries for MY 2001 are forecast to increase 5 percent to 34,500 tons due to expected higher international demand. Falling international prices and increased import competition in the U.S. strawberry market could affect Mexican exports. Imports of frozen strawberries are minimal. Under NAFTA, the 2001 import tariff rate on frozen strawberries is 2.8 percent and the 2002 tariff rate will be 1.4 percent. Mexico charges a 20 percent duty on imports from non-NAFTA countries.

### **Poland–Fresh Strawberries**

Poland's fresh strawberry crop for MY 2001 (January 2002/December 2002) is forecast to fall 33 percent to 160,000 tons due primarily to lower prices and reduced plantings. Favorable weather conditions and increased cultivation resulted in another record crop for MY 2000. During this period, fresh strawberry production jumped 38 percent from 171,000 tons to 238,000 tons. Although yields were higher, lower prices minimized farmers' profits.



Exports of fresh strawberries are projected to fall to 11,970 tons in MY 2001. In MY 2000, exports were estimated at 14,970 tons. Polish exports of fresh chilled strawberries are carried out by private Polish firms as well as foreign companies seasonally operating in Poland. Germany, Austria, Netherlands and Switzerland remain the top export markets. Limited quantities of strawberry imports from Spain and Italy supply the domestic market during the off season. Imports are mostly sold in supermarkets and vegetable stands in larger cities, but their high prices limit sales.

### **Poland–Frozen Strawberries**

Production of frozen strawberries in MY 2001 (January 2002 /December 2002) is forecast to fall 6 percent to 103,000 tons. The increase in fresh strawberry output in MY 2000 supplied the processing industry with an estimated 110,000 tons in strawberries, significantly increasing exports. No official data on strawberry stocks is available.

Frozen strawberry exports are projected to decrease to 83,000 tons in MY 2001, a 14-percent decrease from the previous year due to lower international prices. Prices for strawberry exports during the summer of 2001 dropped to the level of DM 1,200 (\$597) per ton as compared with DM 1,600 (\$789) offered during the summer of 2000. Nevertheless, the volume of exports increased an estimated 17 percent to 96,000 tons in MY 2000. The European Union, led by Germany, remained the top export market for Poland's frozen strawberries. Relatively high tariffs, ranging from 25-30 percent, limit the imports of frozen strawberries.

### **Japan–Fresh Strawberries**

Japan's fresh strawberry crop for MY 2001 (October 2001/September 2002) is projected at 200,000 tons, a decrease of 2 percent from the previous year. MY 2000 fresh strawberry production was revised upward from 180,000 tons to 205,000 tons.

Imports of fresh strawberries, primarily from the United States, are forecast at 6,000 tons in MY 2001. In MY 2000, the U.S. exported 4,150 tons of fresh strawberries to Japan, accounting for 71 percent of all imports. Japan's domestic demand for fresh U.S. strawberry is expected to remain stable at roughly 4,300 tons in MY 2001. Most of the U.S. strawberries are consumed by Japan's confectionary industry as cake decorations, but Japanese retailers are expanding their sales of fresh U.S. berries through in-store sampling demonstrations. Fresh strawberry imports from the United States generally peak in the summer and fall, while the winter and spring demands are supplied by domestic production. Fresh strawberry imports are levied a 6.0 percent duty.

### **Japan–Frozen Strawberries**

Japan's frozen strawberry production is quite limited, with an estimated 500 tons in MY 2001. The bulk of the frozen strawberry supplies are imported from China, the United States, South Korea and Mexico. Frozen strawberry imports for MY 2001 are estimated to remain near existing levels of

30,000 tons. In MY 2000, China surpassed the United States as the leading supplier of imported frozen strawberries to Japan due in large part to its cheaper production costs.

The majority of the imported frozen strawberries from the United States are generally used for jam processing, sweet desserts and tropical drinks. Some of the supplies are also used in scones, breads, and Danish pastries. U.S. strawberries are currently selling at 498-580 yen (\$4.17 - \$ 4.86) per container (280 grams) in Tokyo's supermarkets. Duties on imported frozen strawberries range from 9.6 to 12 percent.

### **Spain–Fresh Strawberries**

Although fresh strawberry production is estimated to increase by 6 percent to 322,000 tons in MY 2001 (January 2002/December 2002), it is significantly down from the record 370,000 tons produced in MY 1998. Industry sources expect further planting reductions over the next three years. In MY 2000, fresh strawberry production fell an estimated 13 percent from the previous year, largely due to unfavorable weather conditions and labor shortages.

In MY 2001 exports of fresh strawberries are projected to reach 200,000 tons, an increase of 3 percent from the previous year. As a result of lower supplies and adverse weather conditions, total exports in MY 2000 fell to 195,000 tons. Top markets for Spain's fresh strawberry exports remain Germany, France and the United Kingdom. Imports are quite limited, with France and Morocco being the largest suppliers. Spain's large strawberry supplies and transportation issues make market conditions unfavorable for U.S. exports.

### **Spain–Frozen Strawberries**

As a result of less land under cultivation, frozen strawberry production is forecast to decline by 2 percent in MY 2001 (January 2002/December 2002) to reach 35,200 tons. In MY 2000, strawberry production was revised from 41,500 tons to 32,000 tons. Frozen strawberry exports in MY 2001 are forecast to decrease by 4 percent to 24,000 tons. The majority of its frozen strawberry exports are destined for other EU countries.

### **Italy–Fresh Strawberries**

Fresh strawberry production in Italy is expected to fall 5 percent in MY 2001 (January 2002/December 2002), amounting to 97,000 metric tons. MY 2000 production numbers were revised downward from 102,000 tons to 101,600 tons due to labor shortages and lower farmers' incomes. Italy's exports of fresh strawberries are projected to be 35,000 tons in MY 2001, a 5-percent decrease from MY 2000. Imports of fresh strawberries for MY 2001 are expected to remain the same as the previous year at 28,000 tons.

## Italy–Frozen Strawberries

In MY 2001, frozen strawberry production is forecast to remain unchanged from the previous year at 10,000 tons. Exports of frozen strawberries are relatively small and are estimated to fall 23 percent to 1,000 tons in MY 2001. Imports, primarily from Spain, are forecast at 8,000 tons. MY 2000 imports were revised downward from 8,000 tons to 6,000 tons as a result of Spain's smaller strawberry crops.

## United States

The strawberry forecast for MY 2001 will be available in April on our strawberry commodity page, which is located at the following address: <http://www.fas.usda.gov/horticulture/strawberry.html>

In CY 2000, fresh strawberry production was up 2 percent to 838,052 tons from the previous year. Planted acreage from the two largest strawberry producing states, California and Florida, was up a combined 10 percent.

In the first nine months of CY 2001, U.S. exports of fresh strawberries were approximately 51,000 tons, a 10-percent decrease from the same period a year ago as a result of a smaller strawberry crop. Total exports in CY 2000 reached an estimated 62,000 tons, with Canada, Mexico and Japan remaining the top export markets.

In the first nine months of CY 2001, exports of frozen strawberries slightly increased to 15,090 tons, compared to 15,066 tons for the same period a year ago. U.S. exports of frozen strawberries face increasing competition from low-cost production countries like China and Mexico. In CY 2000, total frozen exports fell 23 percent from the previous year to approximately 19,400 tons. Japan, Canada and Australia remain the largest markets for frozen U.S. strawberry exports.

*(The FAS Attache Report search engine contains reports on Fresh Strawberry industries for 6 countries, including Spain, Italy, and Mexico. For information on production and trade, contact Rey Santella at 202 720-6877 or visit the strawberry commodity page at <http://www.fas.usda.gov/http/horticulture/strawberry.html> For information on marketing contact Elizabeth Mello at 202-690-6057).*

**FRESH STRAWBERRIES : PRODUCTION, SUPPLY, AND DISTRIBUTION  
MARKETING YEARS 1998/99-2001/02**

	<b>Production</b>	<b>Imports</b>	<b>Exports</b>	<b>Processing</b>	<b>Domestic Consumption</b>
<b>Canada 1/</b>					
1998	26,349	49,357	170	3,000	72,536
1999	21,000	47,363	170	2,400	68,428
2000	25,000	48,000	478	2,500	70,022
2001	25,000	50,000	300	2,600	72,100
<b>Italy 1/</b>					
1998	109,600	22,750	45,824	10,000	76,526
1999	108,600	26,872	36,117	12,000	87,355
2000	101,600	22,000	37,000	10,000	76,600
2001	97,000	28,000	35,000	10,000	80,000
<b>Japan 2/</b>					
1998/99	203,100	4,724	0	2,300	205,524
1999/2000	205,300	5,474	0	2,600	208,174
2000/01	205,000	5,770	0	2,600	208,170
2001/02	200,000	6,000	0	2,500	203,500
<b>Mexico 3/</b>					
1998/99	141,464	4,000	48,899	62,200	34,365
1999/2000	141,583	7,932	35,570	53,000	60,945
2000/01	121,000	9,000	30,000	43,000	57,000
2001/02	119,000	9,000	34,000	45,000	49,000
<b>Poland 1/</b>					
1998	178,000	900	12,300	124,000	42,600
1999	171,000	970	11,580	117,000	43,390
2000	238,000	970	14,970	140,000	84,000
2001	160,000	970	11,970	109,000	40,000
<b>Spain 1/</b>					
1998	369,700	3,100	225,400	70,000	77,400
1999	357,000	3,500	206,000	66,500	88,000
2000	304,000	3,500	195,000	50,000	62,500
2001	322,000	3,000	200,000	55,000	70,000
<b>United States 1/ 4/</b>					
1998	743,756	26,376	49,564	229,426	491,142
1999	821,183	43,001	56,753	252,337	560,117
2000	838,057	34,580	61,928	211,060	599,649
2001	NA	NA	NA	NA	NA
<b>World Total</b>					
1998	1,849,396	127,832	389,346	523,837	1,069,068
1999	1,842,540	126,691	351,365	464,560	1,155,941
2000	1,832,657	123,820	339,376	459,160	1,157,941
2001	923,000	96,970	281,270	224,100	514,600

1/ Marketing season is on a calendar year basis.

2/ Marketing season begins in October of first year shown.

3/ Marketing season begins in August of first year shown.

4/ 1999/2000 production is a 3 year historical average from ERS, Fruit and Tree Nut Situation and Outlook Report, October 2000.

Sources: U.S. Agricultural Attaches. USDA - NASS and ERS estimates.

**FROZEN STRAWBERRIES : PRODUCTION, SUPPLY, AND DISTRIBUTION  
MARKETING YEARS 1998/99-2001/02**

	<b>Beginning Stocks</b>	<b>Production</b>	<b>Imports</b>	<b>Exports</b>	<b>Domestic Consumption</b>	<b>Ending Stocks</b>
<b>Canada 1/</b>						
1998	1,000	3,000	16,277	660	18,617	1,000
1999	1,000	2,500	14,450	451	16,499	1,000
2000	1,000	2,500	14,000	235	16,165	1,100
2001	1,100	2,600	13,400	400	16,700	0
<b>Italy 1/</b>						
1998	0	10,000	7,720	2,523	15,197	0
1999	0	12,000	6,691	1,534	17,157	0
2000	0	10,000	6,000	1,300	14,700	0
2001	0	10,000	8,000	1,000	17,000	0
<b>Japan 2/</b>						
1998/99	0	350	29,932	0	30,282	0
1999/2000	0	520	27,434	0	27,954	0
2000/01	0	520	29,600	0	30,120	0
2001/02	0	500	30,000	0	30,500	0
<b>Mexico 3/</b>						
1998/99	0	62,200	266	51,660	10,806	0
1999/2000	0	53,000	99	41,590	11,509	0
2000/01	0	43,000	180	32,800	10,380	0
2001/02	0	45,000	200	34,500	10,700	0
<b>Poland 1/</b>						
1998	0	97,000	955	72,000	13,955	12,000
1999	12,000	110,000	1,152	93,304	24,348	5,500
2000	5,500	110,000	500	96,000	20,000	0
2001	0	103,000	1,000	83,000	21,000	0
<b>Spain 1/</b>						
1998	0	45,500	6,018	30,700	20,818	0
1999	0	42,200	7,800	24,000	22,800	3,500
2000	3,500	32,000	8,000	23,000	20,000	500
2001	500	35,200	7,000	24,000	18,700	0
<b>United States 1/ 4/</b>						
1998	91,373	229,476	24,581	27,025	229,620	125,964
1999	125,964	252,337	40,721	25,282	285,964	120,000
2000	NA	211,060	35,374	19,408	248,606	NA
2001	NA	NA	NA	NA	NA	NA
<b>World Total</b>						
1998	92,373	447,526	85,749	184,568	339,295	138,964
1999	138,964	472,557	98,347	186,161	406,231	130,000
2000	10,000	409,080	93,654	172,743	359,971	1,600
2001	1,600	196,300	59,600	142,900	114,600	0

1/ Marketing season is on a calendar year basis.

2/ Marketing season begins in October of first year shown.

3/ Marketing season begins in August of first year shown.

4/ 1999/2000 production is a 3 year historical average from ERS, Fruit and Tree Nut Situation and Outlook Report, October 2000.

Sources: U.S. Agricultural Attaches. USDA - NASS and ERS estimates.



**U. S. Exports of Fresh Strawberries**  
**Calendar Years 1997 - 2000 and 2000 - 2001 (January - September) Comparisons**

Destination	1997	1998	1999	2000	Jan - Sep 2000	2001
Canada	39,881	36,322	43,975	48,486	45,600	40,868
Mexico	1,509	3,518	4,385	6,801	6,257	7,024
Japan	6,734	5,687	5,961	5,425	3,718	2,689
United Kingdom	2,853	2,249	1,263	614	613	215
France	376	453	467	219	199	48
Bahamas, The	0	0	0	0	0	45
United Arab Emirat	0	0	0	0	26	23
Spain	0	0	0	0	0	23
Argentina	0	0	0	0	0	18
Colombia	0	0	0	0	0	14
Other	1,199	1,366	702	383	341	72
<b>Total</b>	<b>52,652</b>	<b>49,595</b>	<b>56,753</b>	<b>61,928</b>	<b>56,753</b>	<b>51,039</b>

Source: U.S. Bureau of the Census.

**U. S. Exports of Frozen Strawberries**  
**Calendar Years 1997 - 2000 and 2000 - 2001 (January - September) Comparisons**

Destination	1997	1998	1999	2000	Jan - Sep 2000	2001
Japan	13,804	15,331	14,637	9,832	6983	6709
Canada	5,402	8,512	8,446	7,796	6654	6114
Australia	647	1,474	1,392	944	723	831
France	228	323	201	220	220	718
Mexico	145	425	128	169	106	258
Saudi Arabia	0	0	120	124	67	173
Singapore	0	0	89	106	124	111
United Kingdom	0	37	85	43	38	35
Kuwait	0	11	60	38	0	27
Korea	953	71	36	33	0	21
Other	232	841	88	103	151	94
<b>Total</b>	<b>21,411</b>	<b>27,025</b>	<b>25,282</b>	<b>19,408</b>	<b>15,066</b>	<b>15,091</b>

Source: U.S. Bureau of the Census.

**U. S. Imports of Fresh Strawberries**  
**Calendar Years 1996 - 2000 and 2000 - 2001 (January - September) Comparisons**

Destination	1997	1998	1999	2000	Jan - Sep 2000	2001
Mexico	13,744	25,358	42,201	33,117	32170	29,183
New Zealand	576	767	539	670	0	2
Canada	88	70	170	478	463	240
Australia	33	71	40	216	0	2
Argentina	7	28	30	54	9	0
Belgium-Luxembourg	0	45	6	38	0	0
Peru	0	0	6	0	0	0
Other	31	37	9	7	1	46
<b>Total</b>	<b>14,479</b>	<b>26,376</b>	<b>43,001</b>	<b>34,580</b>	<b>32643</b>	<b>29,473</b>

Source: U.S. Bureau of the Census.

**U. S. Imports of Frozen Strawberries**  
**Calendar Years 1996 - 2000 and 2000 - 2001 (January - September) Comparisons**

Destination	1997	1998	1999	2000	Jan - Sep 2000	2001
Mexico	26,622	22,447	37,316	30,583	29,656	24,152
Ecuador	447	544	1,271	1,586	1,053	1,536
Canada	272	455	447	235	384	384
China; Peoples Rep.	88	530	690	169	169	578
Chile	189	58	207	838	789	954
Guatemala	38	509	214	0	0	0
Morocco	0	0	225	196	0	0
Argentina	0	0	140	419	0	0
Macedonia (Skopje)	0	20	75	0	0	0
Israel	0	0	21	0	0	0
Other	13	18	115	1,348	385	66
<b>Total</b>	<b>27,669</b>	<b>24,581</b>	<b>40,721</b>	<b>35,374</b>	<b>33,484</b>	<b>38,851</b>

Source: U.S. Bureau of the Census.

## World Trade Situation and Policy Updates

### **Canada Delays Enforcement of Import Ban on “5 a Day” Logo until September 1, 2002:**

Following close consultations between both U.S. and Canadian industry and government officials, the Canadian Food Inspection Agency (CFIA) has notified USDA that it has decided to delay until September 1, 2002, its announced ban on prepackaged produce from the United States bearing the “5 a Day For Better Health” logo. Based on the commitment of U.S. shippers to bring all packaging into compliance with Canadian requirements, the CFIA has decided to approve the use of the logo on prepackaged fresh fruits and vegetables to minimize trade disruptions during this transition period. Over the next 10 months, the CFIA will issue warnings to Canadian receivers when product is found to be in violation. But, effective September 1, 2002, the CFIA will fully apply Canadian requirements on violations. However, on a positive note, Canadian officials expressed interest in opening a dialogue to form a bilateral industry/government task force to examine our respective food labelling requirements.

**Canada Initiates Anti-dumping Investigation Against U.S. Fresh Tomatoes:** On November 9, 2001, the Canadian Customs and Revenue Agency (CCRA) initiated an anti-dumping investigation against imports of fresh tomatoes from the United States, excluding tomatoes for processing. The CCRA investigation is in response to a complaint filed by the Canadian Tomato Trade Alliance (CTTA) of Vancouver, British Columbia, which alleges that fresh tomatoes from the United States have been dumped in Canada. The period of the investigation is from October 1, 2000, to September 30, 2001. As a result, the Canadian International Trade Tribunal (CITT) will conduct a preliminary inquiry to determine injury and must make its decision within 60 days. The CCRA has 90 days to make a preliminary determination on the extent of the alleged dumping. Should the CCRA make a preliminary determination of dumping, the Agency must make a final determination within 90 days of the date of the preliminary determination. In its complaint, the CTTA estimates the margins of dumping range from 14 percent to 76 percent, as a percentage of normal value. According to U.S. Census data, U.S. exports of fresh tomatoes to Canada in CY 2000, totaled 136,872 tons valued at \$114 million, up 5 percent in volume and 15 percent in value from the previous year.

**Top United States Horticultural Product Exports By Value**  
Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001
--- 1,000 Dollars ---						
Almonds	942,620	879,032	772,891	696,818	586,751	683,881
Wine & Wine Prdts.	305,546	390,376	510,923	545,287	549,559	549,930
Frz. Potato Fries	256,289	294,417	313,209	343,216	339,475	361,699
Fresh Apples	371,773	412,855	328,068	375,869	334,217	415,592
Fresh Grapes	304,322	313,836	274,953	283,865	328,221	394,380
Orange Juice All	274,362	305,172	295,564	307,165	290,244	251,749
Oranges	277,184	308,055	339,114	159,585	267,145	304,402
Potato Chips	166,188	145,468	226,987	257,355	243,014	183,226
Grapefruit	258,903	240,408	189,744	221,443	207,723	201,471
Fresh Lettuce	132,866	146,640	173,746	157,262	179,926	201,613
Beer	377,324	341,784	280,088	211,861	176,642	200,266
Fresh Cherries	130,790	140,650	113,556	154,793	169,150	160,374
Walnuts	195,802	195,209	153,863	154,449	149,907	175,708
Fresh Tomatoes	100,467	123,789	122,345	127,153	148,248	150,990
Raisins	200,596	204,388	199,733	198,817	146,820	151,312
Proc. Sweet Corn	137,011	167,490	139,068	148,050	145,380	122,295
Prunes	139,090	138,398	133,732	133,885	133,027	151,954
Fresh Broccoli	84,215	92,693	90,778	100,603	126,610	104,770
Strawberries	91,738	97,020	93,349	102,464	118,905	110,702
Peaches	71,935	92,883	74,512	95,130	101,613	121,037
Total Other	5,220,264	5,593,378	5,492,927	5,524,114	5,794,621	6,100,104
<b>GRAND TOTAL</b>	<b>10,039,285</b>	<b>10,623,941</b>	<b>10,319,150</b>	<b>10,299,184</b>	<b>10,537,198</b>	<b>11,097,455</b>

**Top United States Horticultural Product Exports By Volume**  
Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001
Fresh Broccoli	129,168	130,999	126,791	154,514	182,863	157,770
Fresh Apples	565,910	690,595	539,685	664,969	568,158	745,053
Orange Juice All	442,080	565,332	553,175	554,951	551,087	465,370
Oranges	497,077	569,739	609,433	247,419	487,706	541,159
Frz. Potato Fries	350,638	396,738	438,425	468,826	469,185	508,177
Grapefruit	497,401	484,417	387,216	428,784	389,564	392,905
Fresh Lettuce	286,256	294,571	303,816	312,563	328,311	350,378
Wine & Wine Prdts.	170,332	208,786	266,294	274,696	286,251	313,122
Beer	614,202	536,362	425,523	330,158	277,230	301,559
Fresh Grapes	240,704	236,400	214,569	221,158	269,999	306,869
Almonds	301,970	187,953	202,968	200,847	222,299	258,969
Proc. Sweet Corn	168,644	203,613	171,294	186,153	186,184	152,469
Fresh Tomatoes	131,308	153,657	133,687	148,271	181,810	173,470
Pears	144,493	126,603	156,807	145,816	162,592	158,411
Peaches	74,841	103,442	80,023	97,974	111,017	131,212
Lemons	132,177	120,330	113,392	113,931	105,990	110,404
Potato Chips	59,930	53,614	103,025	104,366	103,616	73,297
Raisins	118,942	115,215	120,741	104,225	84,054	110,278
Prunes	62,548	67,530	70,864	68,412	66,958	83,471
Walnuts	83,287	81,118	63,800	67,354	66,132	71,148

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1000 kg.

Source: U.S. Department of Commerce, Bureau of the Census.

### Top United States Horticultural Product Imports By Value

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001
--- 1,000 Dollars ---						
Wine & Wine Prdts.	1,360,163	1,629,254	1,829,709	2,148,127	2,271,772	2,286,022
Beer	1,302,759	1,443,326	1,677,002	1,865,087	2,126,042	2,296,089
Bananas & Plantns	1,156,330	1,194,458	1,188,442	1,180,474	1,098,402	1,125,993
Nursery Products	538,109	565,267	632,672	673,281	745,826	789,154
Cut Flowers	573,399	572,926	630,067	578,847	623,184	577,387
Fresh Tomatoes	679,977	611,612	735,180	713,029	608,514	755,022
Fresh Grapes	344,799	386,183	440,659	545,770	518,260	580,879
Cashews	300,206	292,315	339,490	389,300	488,470	366,689
Fresh Peppers	199,403	251,908	343,606	324,863	451,811	507,984
Frz. Potato Fries	103,699	156,831	216,576	252,437	321,905	338,237
Essential Oils	317,821	322,447	350,086	317,481	310,513	300,819
All Apple Juices	327,267	354,632	228,735	210,586	278,865	230,686
Fresh Melons	198,811	226,502	250,921	277,917	259,788	285,715
All Orange Juices	223,809	240,072	211,353	285,927	243,386	185,031
Pineapple: Presrvd	199,358	208,941	187,116	245,529	201,027	165,878
Olives	182,024	184,217	181,730	199,926	185,239	204,835
Fresh Cucumbers	115,608	100,823	154,634	138,231	168,696	200,530
Fresh Mangos	100,039	123,009	125,047	139,041	142,005	152,102
Fresh Onions	146,632	127,447	151,990	135,587	131,707	168,115
Total Other	3,721,871	4,088,077	4,501,501	5,241,397	5,250,565	5,493,589
GRAND TOTAL	12,092,084	13,080,247	14,376,516	15,862,837	16,425,977	17,010,756

1/ Nursery Products excludes cut flowers.

### Top United States Horticultural Product Imports By Volume

Ranked In Terms of Highest Value (includes only products with specific commodity definitions)

Commodity 1/ 2/	FY 1996	FY 1997	FY 1998	FY 1999	FY 2000	FY 2001
Wine & Wine Prdts.	336,294	432,192	428,664	419,843	481,362	510,923
Beer	1,446,244	1,612,379	1,869,577	2,072,387	2,290,531	2,490,367
Bananas & Plantns	3,973,927	3,911,294	4,135,832	4,373,166	4,350,816	4,046,749
Nursery Products	2,040,035	2,206,085	2,460,306	2,765,380	2,860,717	2,926,158
Cut Flowers	2,807,090	2,770,092	2,770,186	2,708,264	2,804,814	2,641,980
Fresh Tomatoes	724,621	743,205	856,852	722,519	708,742	868,111
Fresh Grapes	341,098	351,567	419,956	387,165	452,182	418,443
Cashews	61,037	62,669	74,373	69,549	86,244	83,165
Fresh Peppers	269,558	284,221	319,671	345,425	352,149	346,522
Frz. Potato Fries	170,308	269,794	353,931	397,455	470,586	519,761
Essential Oils	33,394	43,609	90,334	45,219	65,379	39,679
All Apple Juices	856,697	1,084,986	1,016,823	1,139,079	1,169,591	1,231,177
Fresh Melons	661,426	779,005	860,437	873,052	899,000	878,220
All Orange Juices	836,648	1,116,798	1,063,239	1,326,139	1,284,975	975,716
Pineapple: Presrvd	309,742	295,858	255,051	330,773	329,198	285,216
Olives	72,287	81,511	92,958	96,959	93,906	119,999
Fresh Cucumbers	295,907	302,306	327,745	336,026	346,767	373,503
Fresh Mangos	166,058	191,115	188,767	213,195	231,075	229,476
Fresh Onions	266,779	261,088	259,188	246,548	224,069	269,171

1/ Wine and beer is reported in 1,000 liters, orange juice in 1,000 single strength liters, and all other groups in 1,000 kg

2/ Nursery Products excludes cut flowers.

Source: U.S. Department of Commerce, Bureau of the Census.



### Selected Horticultural Crop Prices Received By U.S. Growers

Commodity	Domestic	2000	2001	% Change	
	Units	Oct	Sept	Oct /1	Last Month Last Year
Dollars/unit					
Grapefruit 2/	Box	4.77	6.89	5.29	-23.2% 10.9%
Lemons 2/	Box	4.94	19.02	20.37	7.1% 312.3%
Limes 2/	Box	0	0	0	n/a n/a
Oranges 2/	Box	1.5	6.53	5.12	-21.6% 241.3%
Tangelos 2/	Box	0	0	0	n/a n/a
Tangerines 2/	Box	6.03	0	9.22	n/a 52.9%
Temples 2/	Box	0	0	0	n/a n/a
Apples, fresh 3/	Lb.	0.218	0.187	0.242	29.4% 11.0%
Grapes	Ton	690	630	600	-4.8% -13.0%
Peaches	Lb.	0	0.292	0	-100.0% n/a
Pears, fresh 3/	Ton	362	463	413	-10.8% 14.1%
Strawberries, fresh	Lb.	0.954	0.781	0.895	14.6% -6.2%
Asparagus 4/	Cwt.	152	248	140	-43.5% n/a
Broccoli 4/	Cwt.	34.1	22.9	25	9.2% -26.7%
Cantaloupes	Cwt.	25.6	13.5	15.9	17.8% -37.9%
Carrots 4/	Cwt.	14.2	15.4	17	10.4% 19.7%
Cauliflower 4/	Cwt.	21.6	23.5	23.9	1.7% 10.6%
Celery 4/	Cwt.	12.8	10.2	8.76	-14.1% -31.6%
Sweet Corn 4/	Cwt.	24.1	19.1	19.5	2.1% -19.1%
Cucumbers 4/	Cwt.	22.5	22.1	15.5	-29.9% -31.1%
Lettuce 4/	Cwt.	16.2	26.2	11.9	-54.6% -26.5%
Onions 4/	Cwt.	10.2	13.2	10.4	-21.2% 2.0%
Snap Beans 4/	Cwt.	57.2	60.4	53.3	-11.8% -6.8%
Tomatoes 4/	Cwt.	42.1	20.8	25.1	20.7% -40.4%

1/ Preliminary.

2/ Equivalent on-tree returns.

3/ Equivalent packinghouse-door returns for CA and NY (apples only), OR (pears only), and WA (apples, peaches, and pears). Prices as sold for other states.

4/ Fresh-market, FOB shipping point.

Weight per box of citrus.

Grapefruit : AZ, CA = 67 Lbs., Florida = 85 Lbs., and Texas = 80 Lbs. per box.

Lemons: AZ, CA = 76 Lbs. per box.

Limes: Florida = 88 Lbs. per box.

Oranges: AZ, CA = 75 Lbs., Florida = 90 Lbs., and Texas = 85 Lbs. per box.

Tangelos and Temples: Florida 90 Lbs. per box.

Note: Zeroes indicate insufficient information or insufficient sales to establish a price.

Source: National Agricultural Statistics Service (NASS), USDA.

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